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27

Foreign CROPS AND MARKETS



VOLUME 65

NUMBER 21

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FOB RELEASE

MONDAY

NOVEMBER 24, 1952

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UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D.C.

L A T E N E W S

The Government of India recently announced a cotton import quota of 500,000 bales (408,000 bales of 500 pounds gross) for the January-June 1953 period. This quota is for cotton from all sources, including the United States. An announcement was also made that outstanding licenses for United States cotton (i.e., licenses issued during 1951-52 which have not thus far been used) may now be used until June 30, 1953. Also, importers will be permitted to convert such licenses for the purchase of equivalent quantities of cotton from sources other than United States, provided no dollar compensation is involved. The recently announced quota of 408,000 bales (500 pounds gross) is in addition to the amounts covered by the outstanding 1951-52 licenses which totaled nearly 160,000 bales as of October 11, 1952.

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The consumption of raw cotton in Canada during October 1952 totaled 36,240 bales (500 pounds gross), an increase of about 5,900 bales over September 1952 and 600 bales over October 1951. October consumption was 40 percent above the 1935-39 base-period average.

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Exports of cotton from the United States in September totaled 251,000 bales of 500 pounds (241,000 running bales), including 55,000 bales to the United Kingdom, 43,000 to Japan, 25,000 to Spain, 24,000 to France, 20,000 to Western Germany, 20,000 to Canada, 10,000 to Korea, 9,000 to India, 9,000 to Colombia, 9,000 to Belgium, and 5,000 each to Italy and the Netherlands. The August-September 1952 total is 362,000 bales (347,000 running bales) compared with 524,000 bales (502,000 running bales) for August-September 1951. A cotton trade analysis will follow in next week's issue of Foreign Crops and Markets.

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The Government of Egypt on November 18 issued an order limiting declines in cotton future prices to 1 percent daily.

(Continued on Page 499)

FOREIGN CROPS AND MARKETS

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WORLD PEANUT PRODUCTION EXPECTED TO BE THE SMALLEST OF POSTWAR PERIOD

World peanut production in 1952 is forecast at 10.2 million short tons on the basis of preliminary estimates available to the Office of Foreign Agricultural Relations. While this volume of production would represent a drop of only 1 percent from 1951, it would be the smallest outturn since 1945.

The expected decline is due largely to the fact that losses foreseen for the United States, China, French West Africa and British West Africa total 130,000 tons more than the gain forecast for India--the one major producing area reporting an increase in production.

World totals for 1950 and 1951 have been revised downward in keeping with revisions for China for which new information has been received for those years.

North American peanut production in 1952 is down about one-fourth from 1951, principally the result of the sharp decline in the United States, which had the smallest peanut crop since 1939. Acreage for picking and threshing is the smallest since 1937. United States acreage was cut sharply because of smaller acreage allotments and repeal of legislation permitting farmers to pick and thresh peanuts for crushing from acreage in excess of allotments. Also, yields were less than the year before. From the position of third in world production--held from the early postwar period through 1950--the United States has now dropped to fifth place.

Mexico's production is expected to be much smaller this year. Farmers reduced their plantings because of the weak demand of the export market.

An increase of some 190,000 tons is expected in Asia as India's crop is reported to be around 10 percent larger than in 1951. China's output, however, is believed to be down somewhat.

Based on meager information concerning government plans, weather and trade trends, China's crop is estimated at about 2.4 million tons compared with 2.5 in 1951 and 2.8 in 1950. This means that production, in addition to being smaller than in the previous 2 years is down sharply from the 1935-39 and 1945-49 average output of 2.9 million tons. Plantings are believed to have been reduced in 1951 and 1952 because of reduced export demands. The weather during those 2 years, however, was better than in 1950.

South America's peanut harvest probably reached a near-record level this year as a result of good crops in Argentina and Brazil. Favorable weather in the peanut region and attractive prices induced Argentine

PEANUTS 1/: Acreage and production in specified countries and the world, averages 1935-39 and 1945-49, annual 1950-52

Continent and country	Acreage 2/				Production			
	Average 1935-39	1945-49	1950	1951	Average 1945-49	1950	1951	1952 3/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
NORTH AMERICA								
Mexico.....	33:	79:	133:	-	12.2:	37.4:	88.2:	70.0
United States.....	1,659:	3,056:	2,624:	2,018:	614.7:	1,046.3:	838.1:	631.4
Cuba.....	-	78:	-	-	8.4:	19.2:	4.2:	-
Dominican Republic.....	-	44:	56:	56:	3.8:	12.2:	22.5:	-
Total 2/.....	1,740:	3,260:	2,850:	2,260:	640.0:	1,116.5:	955.0:	728.0
EUROPE								
Bulgaria.....	5:4/	3:	-	-	2.2:4/	1.1:	-	-
Italy.....	2:	9:	9:	11:	1.6:	6.3:	8.2:	-
Spain.....	24:	16:	18:	19:	23.3:	11.7:	13.4:	-
Total (excl. U.S.S.R.) 5/.....	35:	35:	40:	45:	28.0:	21.0:	27.0:	27.0
U.S.S.R. (Europe and Asia).....	29:	-	-	-	-	-	-	-
ASIA								
Turkey.....	3:4/	7:	7:	11:	1.9:	2.8:	4.7:	-
Burma.....	784:	635:	652:	700:7/	192.2:	141.7:	198.2:	-
China.....	3,639:4/	3,755:	-	-	2,913.4:4/	2,880.6:	2,480.0:	2,370.0
Manchuria.....	-	-	-	-	121.6:	-	-	-
French India.....	7:6/	7:	-	-	5.6:6/	6.1:	-	-
French Indochina.....	42:6/	20:	-	-	16.0:6/	5.6:	-	-
India.....	7,535:	9,923:	11,130:	11,755:	3,295.7:	3,750.9:	3,401.4:	3,696.0
Japan.....	19:4/	17:	47:	57:	14.6:	13.4:	32.0:	-
Taiwan (Formosa).....	77:	114:	206:	185:	38.5:	44.6:	66.1:	-
Indonesia 9/.....	572:4/	414:	563:	645:	289.1:	202.3:	234.0:	300.0
Philippine Republic.....	18:4/	27:	-	-	4.7:4/	5.7:	8.8:	-
Thailand.....	-	20:	16:	-	-	10.2:	-	-
Total (excl. U.S.S.R.) 5/.....	13,140:	15,210:	16,650:	17,000:	7,021.9:	7,223.0:	6,612.0:	6,854.0

SOUTH AMERICA													
Argentina.....	207:	188:	292:	188:	260:	340:	87.3:	136.1:	66.8:	102.7:	154.3		
Brazil.....	-	339:	200:	339:	349:	353:6/	14.8:	85.0:	130.3:	166.4:	169.8		
Paraguay.....	29:4/	33:	30:	38:	38:	38:4/	19.4:	14.2:	11.9:	13.7:	-		
Uruguay.....	5:	18:	23:	22:	22:	18:	1.2:	7.5:	4.5:	9.5:	4.8		
Total 5/.....	320:	600:	565:	690:	770:	129.0:	250.0:	219.5:	298.0:	298.0:	348.5		
AFRICA													
Anglo-Egyptian Sudan.....	43:4/	104:	100:	-	-	-	8.1:4/	20.2:	19.8:	-	-		
Belgian Congo.....	243:	484:	484:	685:	-	-	65:1:6/	159.8:	181.4:	175.8:	-		
Tanganyika.....	277:4/	119:	137:	-	-	-	23.4:4/	26.0:	13.2:	-	-		
Uganda.....	156:	350:	338:	-	-	-	78.3:	170.0:	173.9:	-	-		
Cambila.....	-	210:	210:	210:	-	-	58.1:4/	70.4:	72.8:	-	-		
Egypt.....	23:	26:	25:	26:	-	-	17.2:	18.8:	20.0:	20.6:	20.0		
French Equatorial Africa.....	98:4/	-	47:	-	-	-	18.7:4/	23.5:	-	-	-		
French Cameroun.....	279:4/	361:	306:	-	-	-	36.0:	67.3:	110.0:	-	-		
French West Africa.....	2,955:	-	2,524:	2,500:	-	-	875.9:	812.0:	660.0:	860.0:	800.0		
Madagascar.....	14:	32:	29:	-	-	-	6.6:	8.1:	9.7:	13.3:	-		
Mozambique.....	-	-	-	-	-	-	42.9:	28.8:	20.0:	-	-		
Nigeria and Cameroons.....	-	-	2,544:	-	-	-	354.7:	581.6:	350.0:	700.0:	650.0		
Angola.....	18:4/	-	21:	-	-	-	6.2:	5.1:8/	6.8:8/	5.5:	-		
Portuguese Guinea 8/.....	-	-	-	-	-	-	28.0:	40.7:	41.9:	-	-		
Southern Rhodesia.....	6:	6:	9:	-	-	-	1.6:	2.6:	1.9:	-	-		
Union of South Africa 10/.....	56:4/	389:	252:	434:	-	-	12.0:	39.6:	81.9:	101.1:	73.0		
Total 5/.....	6,100:	8,370:	7,460:	7,990:	7,880:	1,750.0:	2,126.0:	1,842.5:	2,413.0:	2,272.0			
OCEANIA													
Australia.....	14:	18:	28:	17:	14:4/	6.1:	16.2:	8.9:	6.1:	5.8			
Total 5/.....	15:	20:	30:	20:	15:	6.5:	16.5:	10.0:	6.5:	6.5			
World total.....	21,380:	28,580:	26,610:	28,055:	26,410:	9,590.0:	10,770.0:	10,550.0:	10,329.0:	10,250.0			

1/ Peanuts in the shell. Southern Hemisphere peanut crops, which are harvested from April to June, are combined with those of the Northern Hemisphere harvested from September through December of the same year. 2/ Figures refer to harvested areas as far as possible. 3/ Preliminary. 4/ Average of less than 5 years. 5/ Includes estimates for the above countries for which data are not available and for minor producing countries. 6/ One year only. 7/ Sown area. 8/ Export figures. 9/ Java and Madura only. 10/ Production on European farms only.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, and other information.

farmers to plant one of the largest areas in recent years. Brazil's crop is only slightly larger than last year but double the 1945-49 average and 11 times the prewar average. Good demand, particularly for edible oil purposes, has held peanut prices firm, with the result that plantings for the 1953 crop, now under way in South Brazil, are expected to increase moderately. Uruguay's crop dropped this year to one-half of last year's harvest.

African peanut production may be down--possibly 140,000 to 150,000 tons this year. In French West Africa, the 1952-53 peanut season had not begun as of early November but the harvest was expected to be slightly lower than last season as unfavorable weather had been reported in several areas. Consequently, the estimate is indicated roughly at 800,000 tons against 860,000 in 1951. The commercialized volume from the 1951 crop was 643,470 tons.

Nigeria may produce around 650,000 tons compared with the bumper crop of some 700,000 tons in 1951. Purchases by the Nigerian Groundnut Marketing Board in 1951-52 amounted to 468,380 tons compared with only 159,870 in 1950-51. It has been reported that prospects of an early movement of heavy supplies of peanuts in the Kano area have been unfavorably affected by the announcement of a curtailment in the goods and passenger services of the Nigerian railways.

With United States production down, French West and British West Africa have regained their positions of third and fourth, respectively, among the peanut producing areas of the world.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. It is based in part upon U.S. Foreign Service reports.

WORLD SUGAR PRODUCTION DECLINES 1/

World production of centrifugal cane and beet sugar for 1952-53 is expected to total 36.7 million short tons, raw value, a decline of 4 percent from the record 38.2 million tons of 1951-52. This production exceeds the average production of 1945-49 and 1935-39 by 34 and 29 percent respectively. Production in 1952-53 probably would total about 3 percent more than the record crop of last season if the harvests in Cuba and Puerto Rico were unrestricted.

The production of noncentrifugal sugar is expected to total 6.7 million short tons, tel quel, in 1952-53, compared with 6.6 million tons in 1951-52, an average 6.2 million tons for 1945-49 and an average 5.4 million tons for 1935-39.

1/ A more extensive statement soon will be published as a Foreign Agriculture Circular by the Office of Foreign Agricultural Relations, U.S. Department of Agriculture, Washington 25, D.C.

CENTRIFUGAL SUGAR (raw value): Production in specified countries
averages 1935-39, 1945-49, annual 1949-52 1/ 2/

Continent and country	Average		1949	1950	1951	1952 3/
	1935-39	1945-49				
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
NORTH AMERICA (cane and beet)						
British Honduras	1:	1:	2:	2:	2:	2
Canada (beet)	76:	99:	120:	160:	133:	160
Costa Rica	9:	20:	23:	24:	27:	27
El Salvador	17:	27:	27:	31:	32:	33
Guatemala	19:	33:	40:	29:	33:	37
Honduras	2:	2:	3:	5:	7:	8
Mexico	353:	636:	692:	778:	807:	865
Nicaragua	9:	21:	26:	30:	34:	37
Panama	5:	11:	17:	18:	22:	25
United States (beet)	1,518:	1,513:	1,570:	2,012:	1,552:	1,500
United States (cane)	474:	455:	521:	564:	418:	550
Hawaii	980:	861:	961:	996:	1,045:	1,075
Puerto Rico	974:	1,134:	1,286:	1,228:	1,360: 4/	1,100
Virgin Islands of the U.S.	6:	6:	11:	7:	12:	12
Antigua	22:	25:	35:	21:	38:	40
Barbados	114:	121:	161:	184:	176:	180
Cuba	3,183:	5,897:	6,127:	6,349:	7,964: 5/	5,680
Dominican Republic	491:	506:	524:	582:	659:	700
Grenada	1:	1:	1:	1:	1:	1
Guadeloupe	60:	48:	72:	82:	103:	105
Haiti	44:	49:	56:	65:	64:	64
Jamaica	119:	235:	304:	300:	298:	320
Martinique	64:	29:	41:	55:	42:	50
St. Kitts	36:	40:	46:	50:	57:	60
St. Lucia and St. Vincent	11:	11:	15:	14:	15:	14
Trinidad	149:	144:	164:	158:	154:	160
Total North America	8,737:	11,925:	12,845:	13,745:	15,055:	12,805
EUROPE (beet)						
Austria	196:	46:	74:	136:	175:	175
Belgium	259:	247:	378:	495:	300:	365
Denmark	260:	266:	356:	410:	397:	335
Finland	13:	14:	25:	25:	23:	28
France	1,078:	823:	971:	1,584:	1,396:	1,350
Germany, Western Zone	610:	524: 6/	691:	1,121:	1,168:	1,100
Ireland	89:	95:	112:	108:	100:	100
Italy	410:	329:	556:	700:	833:	800
Netherlands	261:	270:	449:	453:	383:	400
Spain 7/	202:	200:	207:	219:	364:	535
Sweden	340:	311:	321: 8/	343: 8/	323: 8/	328
Switzerland	13:	28:	29:	31:	33:	33
United Kingdom	514:	613:	569:	815:	753:	740
Yugoslavia	103:	127:	121:	104:	257:	115
Total above	4,348:	3,893:	4,859:	6,544:	6,505:	6,404
Total other Europe	2,926:	2,056:	2,707:	3,334:	3,175:	3,179
Total Europe	7,274:	5,949:	7,566:	9,878:	9,680:	9,583
U.S.S.R. (Europe & Asia)						
(beet)	2,761:	1,643:	2,205:	2,400:	2,300:	2,500

Continued- - -

CENTRIFUGAL SUGAR (raw value): Production in specified countries
averages 1935-39, 1945-49, annual 1949-52 1/ 2/

Continent and country	Average		1949	1950	1951	1952 <u>3/</u>
	1935-39	1945-49				
	1,000	1,000	1,000	1,000	1,000	1,000
	short	short	short	short	short	short
	tons	tons	tons	tons	tons	tons
ASIA (cane)						
Afghanistan (beet)	-	-	5:	5:	5:	5
Burma	27:	10:	4:	5:	16:	17
China incl. Manchuria	100:	80:	86:	67:	95:	109
Formosa	1,240:	372:	708:	407:	610:	800
French Indochina	77:	11:	8:	7:	6:	7
India	1,300:	1,304:	1,310:	1,440:	1,900:	1,700
Indonesia	1,207:	102:	265:	386:	466:	500
Iran (beet)	23:	41:	34:	68:	85:	95
Japan (beet)	46:	11:	15:	23:	31:	35
Pakistan	30:	36:	50:	55:	96:	125
Philippines, Republic of	1,058:	382:	685:	935:	1,073:	1,245
Ryukyu Island	32:	0:	0:	0:	0:	0
Thailand	21:	28:	35:	35:	35:	35
Turkey (beet)	76:	131:	165:	168:	228:	185
Total Asia	5,237:	2,508:	3,370:	3,601:	4,646:	4,858
SOUTH AMERICA: (cane)						
Argentina	510:	654:	641:	718:	760:	700
Bolivia	1:	2:	3:	4:	3:	7
Brazil	830:	1,418:	1,480:	1,737:	1,865:	2,044
British Guiana	210:	198:	219:	243:	260:	280
Colombia	51:	135:	189:	215:	240:	250
Ecuador	24:	44:	54:	61:	56:	60
Paraguay	6:	16:	19:	26:	33:	26
Peru	444:	483:	479:	518:	509:	520
Surinam	15:	5:	3:	4:	7:	8
Uruguay <u>2/</u>	2:	2:	2:	8:	14:	17
Venezuela	22:	41:	59:	53:	70:	75
Total South America	2,115:	2,998:	3,148:	3,587:	3,817:	3,987
AFRICA (cane)						
Belgian Congo	14:	17:	15:	15:	17:	18
British East Africa	63:	89:	91:	89:	88:	75
Egypt	166:	211:	193:	215:	215:	215
Madagascar	14:	14:	16:	15:	15:	17
Madeira and Azore Islands	9:	9:	10:	9:	11:	11
Mauritius	320:	351:	460:	505:	535:	560
Mozambique	81:	86:	91:	101:	103:	90
Angola	37:	52:	55:	57:	56:	55
Reunion	91:	81:	119:	117:	138:	150
Union of South Africa	498:	542:	561:	686:	532:	600
Total Africa	1,293:	1,452:	1,611:	1,809:	1,710:	1,791
OCEANIA (cane)						
Australia	894:	830:	1,051:	1,032:	834:	1,030
Fiji	150:	131:	141:	134:	127:	145
Japanese Mandated Is.	69:	0:	0:	0:	0:	0
Total Oceania	1,113:	961:	1,192:	1,166:	961:	1,175
World total (cane)	16,754:	18,054:	20,272:	21,482:	24,158:	22,644
World total (beet)	11,776:	9,382:	11,665:	14,704:	14,011:	14,055
WORLD TOTAL (beet and cane)	28,530:	27,436:	31,937:	36,186:	38,169:	36,699

1/ Centrifugal sugar, as distinguished from non-centrifugal, includes cane and beet sugar produced by the centrifugal process, which is the principal kind moving in international trade. 2/ Years shown are for crop years; generally the harvesting season begins in the fall months of the year shown or in the early months of the following year, except in certain cane-sugar-producing countries in the Southern Hemisphere, such as Australia, Argentina, Mauritius, Union of South Africa, etc. where the season begins in May or June of the year shown. 3/ Preliminary. 4/ Production probably would slightly exceed that in 1951-52 except for restrictions imposed under the Sugar Act. 5/ Production probably would slightly exceed that of 1951-52 except for restrictions decreed by the Cuban Government. 6/ Includes sugar from beets imported from Netherlands and Belgium. 7/ Includes a small amount of cane. 8/ Includes sugar from Danish beets processed in Sweden. 2/ 1950, 1951, 1952 include a small amount of cane. Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates of countries having boundary changes have been adjusted to postwar boundaries.

NON-CENTRIFUGAL SUGAR: Production in specified countries
averages 1935-39, 1945-49, annual 1949-52 1/2/

Continent and country	Average		1949	1950	1951	1952 <u>3/</u>
	1935-39	1945-49				
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
NORTH AMERICA						
Costa Rica	15:	36:	32:	29:	33:	33
El Salvador	17:	27:	15:	7:	10:	10
Guatemala	31:	35:	28:	28:	30:	30
Honduras	8:	8:	8:	8:	8:	8
Mexico	83:	174:	170:	170:	165:	165
Nicaragua	7:	14:	15:	15:	15:	15
Panama	2:	9:	11:	11:	11:	11
Total North America	163:	303:	279:	268:	272:	272
ASIA						
Burma	86:	74:	75:	75:	75:	75
China	350:	305:	320:	390:	485:	520
Formosa	32:	6:	7:	3:	8:	10
India	3,098:	3,366:	3,280:	3,575:	3,675:	3,700
Japan	4:	14:	16:	18:	15:	15
Pakistan	600:	771:	840:	800:	800:	800
Philippines, Republic of ..	63:	44:	36:	40:	50:	50
Ryukyu Island	90:	4:	10:	18:	19:	20
Thailand	17:	22:	21:	21:	21:	21
Total Asia	4,340:	4,606:	4,605:	4,940:	5,148:	5,211
SOUTH AMERICA						
Brazil	370:	395:	417:	397:	300:	300
Colombia	420:	755:	715:	715:	720:	720
Ecuador	15:	17:	24:	23:	23:	23
Peru	9:	25:	27:	29:	24:	22
Venezuela	60:	110:	130:	130:	110:	110
Total South America	874:	1,302:	1,313:	1,294:	1,177:	1,175
World total	5,377:	6,211:	6,197:	6,502:	6,597:	6,658

1/ Non-centrifugal sugar includes all types of sugar produced by other than the centrifugal process which is largely for consumption in the relatively few areas where produced. The estimates include such kinds known as piloncillo, panelo, papelon, chancaca, rapadura, jaggery, gur, muscovado, panocha, etc. 2/ Years shown are for crop years; generally the harvesting season begins in the fall months of the year shown or in the early months of the following year except in certain cane-sugar-producing countries in the Southern Hemisphere, where the season begins in May or June of the year shown. 3/ Preliminary.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates of countries having boundary changes have been adjusted to postwar boundaries.

World centrifugal cane sugar production is expected to total 22.6 million tons in 1952-53, a decline of 6 percent from the record 24.2 million tons of last year. However, the crop is 5 percent higher than the 21.5 million tons of 1950-51, 25 percent higher than the average 18.1 million tons of 1945-49 and 35 percent higher than the average 16.8 million tons of 1935-39. The decreased cane sugar forecast may be directly attributed to the proposed restrictions on the Cuban and Puerto Rican harvest which are expected to reduce the output of sugar in these areas by 2.7 million tons from the indicated total possible production. Only a few other producers in the world are expecting a reduced production of cane sugar in 1952-53.

Beet sugar production for 1952-53 is expected to total nearly 14.1 million tons or slightly higher than the 14.0 million tons of 1951-52. This compares with the 1945-49 average of 9.4 million tons and the 1935-39 average of 11.8 million tons. Unfavorable weather and disease damage in Europe resulted generally in decreased production on increased acreage. Increased production in the U.S.S.R. is expected to offset the losses in other areas of Europe. Decreased production in other areas of the world are noted for Turkey and the beet area of the continental United States.

Production of centrifugal cane and beet sugar in North and Central America is expected to total 12.8 million tons, or 15 percent less than the 15.1 million tons of 1951-52. Crop restrictions in Cuba and Puerto Rico account for most of this expected decline in production. Except for the beet area of the continental United States, every other area of North and Central America expects to maintain or increase its production for 1952-53.

The centrifugal sugar production of Western Europe is expected to total 6.4 million tons this year, a decline of 100,000 tons from the crop of 1951-52. In general, adverse weather and disease nullified the effect of increased acreage of sugar beets. Reduced production for most areas may be partially offset by the bumper crop of Spain and the increased production of Belgium and the Netherlands. Eastern Europe was blighted by dry weather in every area except Poland. The increased production of the latter area is expected to more than offset the losses in other Eastern European countries. More favorable weather conditions in the U.S.S.R. indicate an increase of production to 2.5 million tons, 200,000 tons more than the production of 1951-52.

The centrifugal sugar production of Asia is expected to total 4.9 million tons, an increase of 210,000 tons over the crop of 1951-52. Maintained or increased production is noted for every country of Asia except India and Turkey.

As in the continent of Asia, only two areas of South America, Argentina and Paraguay, failed to maintain or increase production for this season. Total production is expected to reach nearly 4.0 million tons compared with 3.8 million tons during 1951-52. African centrifugal sugar production this season (1.8 million tons) is expected to exceed that of 1951-52 by 80,000 tons. Only British East Africa and the Portuguese possessions failed to maintain or increase production in this area of the world.

Australia and Fiji, the Oceanic producers, expect to increase production this season to 1.2 million tons, an increase of 22 percent over the 961,000 tons of 1951-52.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. It is based in part upon U.S. Foreign Service reports.

WORLD WOOL PRODUCTION ESTIMATED AT 4,170 MILLION POUNDS IN 1952 ^{1/}

World wool production in 1952 is estimated at 4,170 million pounds, grease basis, an increase of approximately 140 million pounds over 1951 production, according to the semi-annual wool report of the Office of Foreign Agricultural Relations. ^{2/} World wool output has increased each year since the postwar low of 3,710 million pounds in 1947. Output in 1952, reflecting general recovery from drought in several countries, will not, however, be up to the peak production of 4,200 million pounds reached in 1941. This estimate includes both apparel and carpet types.

Generally favorable weather prevailed during the winter just ended in all Southern Hemisphere producing countries with the exception of the Union of South Africa where drought brought about poor feed conditions. Thus substantial recovery from losses due to variable weather conditions in 1950-51, is indicated in Australian wool output. This recovery accounts, for the most part, for the upward revision of the June forecast of world wool production made by this Office. On the other hand, a small reduction in the South African clip is estimated. No further decrease is expected in Argentina where production had been cut back because of drought in the past season.

Most of the increase over last year is in the production of crossbred wool. Output of merino wool is not expected to show any appreciable change and only a slight increase in carpet-type wool is estimated. On a clean basis, 1952 world wool output is expected to yield about 2,350 million pounds.

About half of the increase in 1952 occurred in Australia and New Zealand, one-fourth is attributed to U.S.S.R. and most of the remainder occurred in India, Turkey and the United States. The estimated increase in world wool production reflects practically all of the 4 percent gain in world sheep numbers reported earlier this year.

^{1/} A more extensive statement will soon be published as a Foreign Agricultural Circular available from the Office of Foreign Agricultural Relations, U. S. Department of Agriculture, Washington 25, D. C.

^{2/} This summary is based upon estimates of the spring clip in the Northern Hemisphere combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. Late each spring an estimate is made of the Northern Hemisphere clip, plus a forecast for the Southern Hemisphere. Data, especially for the Southern Hemisphere, are reviewed at this time each fall.

WOOL: Production in specified countries, greasy basis,
averages 1936-40 and 1946-50; annual 1948 to 1952 1/

Continent and country	Averages		1948	1949	1950	1951 2/	1952 2/
	1936-40	1946-50					
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
NORTH AMERICA							
Canada.....	15.6	12.4	11.9	9.8	9.5	6.9	7.6
Mexico.....	10.3	11.4	11.3	11.5	13.2	13.6	14.0
United States							
Shorn.....	360.6	238.5	231.8	212.9	215.4	225.5	229.8
Pulled.....	64.7	46.5	46.6	35.6	32.4	24.9	-
Total.....	425.3	285.0	278.4	248.5	247.8	250.4	260.0
Estimated total 3/.....	451.7	309.4	302.3	270.5	271.2	271.4	282.2
EUROPE							
Austria.....	2.1	1.6	1.8	1.5	1.5	1.4	1.5
Finland.....	2.7	3.2	3.3	3.7	4.0	4.4	4.5
France.....	37.1	30.6	29.3	33.9	35.0	40.0	40.0
Germany (Western).....	21.7	17.3	21.0	19.2	15.3	14.4	14.4
Greece.....	19.3	17.4	18.2	17.1	16.5	17.0	19.2
Ireland.....	17.2	13.1	12.2	12.0	13.7	14.0	14.8
Italy.....	30.4	30.2	28.9	35.3	35.0	35.5	35.0
Netherlands.....	6.1	5.4	4.6	6.2	6.5	6.5	6.5
Norway.....	5.9	6.4	6.2	6.8	7.3	7.7	7.8
Portugal.....	16.3	18.4	18.0	17.0	21.2	22.0	22.0
Spain.....	70.0	83.2	88.0	82.0	90.0	90.0	93.0
United Kingdom.....	110.1	81.2	81.0	88.0	89.0	88.0	90.0
Yugoslavia.....	34.7	30.0	32.6	33.6	34.3	32.0	32.0
Other Europe 4/.....	104.5	82.0	83.4	86.3	89.9	92.2	92.3
Estimated total (excl. U.S.S.R.) 5/6/.....	483.4	425.6	433.4	448.3	464.8	470.9	478.6
U.S.S.R. (Europe and Asia) 5/7/..	310.2	303.5	304.6	314.9	325.0	335.0	370.0

ASIA									
Iran.....	36.3	29.3	29.8	24.7	32.6	34.2	36.6		
Iraq.....	21.6	27.3	32.7	26.7	28.7	30.0	32.0		
Lebanon.....	-	-	-	-	-	2.4	2.5		
Syria.....	10.7	12.2	12.1	10.0	13.0	15.0	16.0		
Turkey.....	67.7	70.7	75.5	70.9	67.2	72.9	75.0		
Afghanistan.....	15.0	16.4	17.0	17.2	18.0	18.0	18.0		
China ^{7/}	88.0	75.0	75.0	75.0	75.0	75.0	75.0		
India.....	72.9	51.8	53.0	46.2	50.5	52.0	58.0		
Pakistan.....	-	26.4	26.0	27.0	27.0	25.0	25.0		
Japan.....	-	-	-	2.2	2.6	3.2	4.5		
Estimated total ^{11/}	344.2	355.6	369.6	346.4	361.5	372.6	387.6		
SOUTH AMERICA									
Argentina.....	411.0	449.8	419.0	420.0	420.0	430.0	420.0		
Brazil.....	35.5	45.8	45.2	48.5	47.4	51.8	52.9		
Chile.....	32.6	42.3	41.9	46.3	41.9	44.1	44.1		
Falkland Islands.....	4.0	4.2	4.2	4.3	4.4	4.2	5.0		
Peru.....	19.4	17.7	17.2	18.7	19.2	20.5	20.5		
Uruguay.....	126.2	162.9	144.0	163.3	180.8	187.4	195.0		
Estimated total ^{12/}	638.9	735.4	685.0	712.7	725.3	749.6	749.4		
AFRICA									
Algeria.....	22.6	16.2	12.0	15.6	19.6	22.8	24.0		
Egypt.....	7.5	6.7	7.7	6.4	8.0	6.6	7.0		
French Morocco.....	35.1	27.2	28.0	30.0	33.1	35.3	39.7		
Tunisia.....	12.0	9.9	7.9	8.0	11.0	12.0	13.0		
Union of South Africa ^{13/}	252.3	215.9	219.0	217.5	227.5	245.0	240.0		
Estimated total ^{14/}	336.8	281.9	279.4	283.0	304.6	328.5	330.5		
OCEANIA									
Australia.....	1,051.9	1,050.0	1,031.0	1,110.0	1,092.0	1,098.0	1,160.0		
New Zealand.....	313.8	371.6	367.0	390.0	390.0	406.7	415.0		
Total.....	1,365.9	1,421.7	1,398.1	1,500.1	1,482.1	1,504.8	1,575.1		
Estimated world total ^{15/}	3,930.0	3,900.0	3,770.0	3,880.0	3,940.0	4,030.0	4,170.0		

^{1/} For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. ^{2/} Preliminary. ^{3/} Includes estimates for Newfoundland, Netherlands West Indies, Guatemala and El Salvador. ^{4/} Includes the Iron Curtain Countries, (Albania, Czechoslovakia, Bulgaria, Hungary, Poland, Rumania and Eastern Germany). ^{5/} Based on present boundaries. ^{6/} Includes estimates for countries producing 2 million pounds or less, namely Belgium, Denmark, Iceland, Sweden and Switzerland. ^{7/} Based on the number of sheep and an average fleece weight of 4.7 pounds per head. ^{8/} Includes Lebanon. ^{9/} Includes China proper (22 provinces), Manchuria, Jehol and Sinkiang (Turkestan). Figures for post-war years of 75 million pounds used only to indicate approximate level. ^{10/} Includes Pakistan. ^{11/} Includes estimates for Cyprus, Palestine and Transjordan, Outer Mongolia, Tibet and Nepal. ^{12/} Includes relatively small production in Bolivia, Colombia, Ecuador, Paraguay and Venezuela. ^{13/} Union of South Africa, Union Protectorates and South West Africa. ^{14/} Includes estimates for Kenya, French West Africa and Togo. ^{15/} Rounded to tens of millions.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates for countries having changed boundaries have been adjusted to present boundaries except as noted. November 1952.

World consumption in the third quarter of 1952 reached an annual rate of 2,260 million pounds clean compared with an annual rate of 2,050 million pounds at the low point in the third quarter of 1951. There has been steady though modest increases each quarter since that time and the present stability in world wool prices plus the apparent low inventory levels in all consumption channels has created an attitude of confidence in wool textile circles throughout the world.

A relatively small increase over the 2,260 million pounds third quarter annual rate of consumption, projected forward over the next 15 months, would lead to an approximate balance between world production and consumption. On the other hand, the presence of larger than normal carry-over stocks in South America should insure an adequate supply of raw wool over the period.

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U.S. FOREIGN TRADE IN AGRICULTURAL PRODUCTS DURING SEPTEMBER 1952 ^{1/}

Exports of agricultural products from the United States during September 1952 were valued at \$220 million compared with \$308 million in September 1951, a decrease of 29 percent. September is the third successive month of the fiscal year in which exports have been below the corresponding month of a year earlier. For the July-September quarter, exports of agricultural products were 31 percent less than during the corresponding quarter of 1951.

The value of the country's exports of nonagricultural commodities was 8 percent higher this September than in September a year ago but for the quarter 5 percent less than last year. The value of all exports, agricultural and nonagricultural for the July-September quarter this year was \$3.3 billion compared with \$3.7 billion a year ago. Agricultural products constituted 18 percent of the total value exported for the first quarter this year and 23 percent of the total a year ago.

On a value basis exports of wheat and wheat flour continued to lead all other agricultural commodities but cotton ran a close second in September, for the first month in this fiscal year. Exports of both wheat and cotton during September and also during the quarter were much below a year ago. Wheat and wheat flour were down 32 percent and cotton down 29 percent in September. For the quarter wheat and wheat flour exports were 32 percent and cotton 40 percent. The value of tobacco exports held third place and the month of September was 32 percent less than in September a year ago and for the quarter 25 percent less.

^{1/} More complete details than presented in this summary will be published in United States Foreign Trade in Agricultural Products for September 1952, available on request from the Office of Foreign Agricultural Relations, U. S. Department of Agriculture, Washington 25, D.C.

UNITED STATES: Summary of exports, domestic, of selected
agricultural products, during September 1951 and 1952

Commodity exported	Unit	September			
		Quantity		Value	
		1951	1952	1951	1952
				1,000	1,000
		Thousands	Thousands	dollars	dollars
ANIMAL PRODUCTS:					
Butter	Lb.	135	26	96	21
Cheese	Lb.	4,698	254	1,934	140
Milk, condensed	Lb.	2,616	1,484	598	360
Milk, whole, dried	Lb.	2,835	2,598	1,676	1,439
Nonfat dry milk solids	Lb.	2,675	2,515	420	465
Milk, evaporated	Lb.	26,573	5,764	3,753	948
Eggs, dried	Lb.	5,938	579	1,083	260
Beef and veal, total <u>1/</u>	Lb.	2,643	1,150	882	310
Pork, total <u>1/</u>	Lb.	5,753	5,673	1,826	1,547
Horse meat	Lb.	1,973	1,142	209	166
Lard	Lb.	41,753	26,611	7,785	3,062
Tallow, edible and inedible	Lb.	41,435	48,266	4,580	3,466
VEGETABLE PRODUCTS:					
Cotton, unmd, excl. linters (480 lb.)	Bale	372	251	70,145	50,136
Apples, fresh	Lb.	7,556	3,851	561	376
Grapefruit, fresh	Lb.	4,190	2,532	174	126
Oranges, fresh	Lb.	60,611	30,972	2,361	1,561
Pears, fresh	Lb.	5,713	4,656	525	391
Prunes, dried	Lb.	3,078	1,607	452	245
Raisins and currants	Lb.	6,436	3,356	822	514
Fruits, canned	Lb.	12,462	20,047	2,073	3,194
Fruit juices	Gal.	2,006	1,752	1,595	1,627
Barley, grain (48 lb.)	Bu.	3,628	5,735	5,744	9,400
Barley malt (34 lb.)	Bu.	429	461	1,087	1,195
Corn, grain (56 lb.)	Bu.	4,075	5,217	7,660	10,253
Grain sorghums (56 lb.)	Bu.	4,414	208	6,247	380
Rice, milled	Lb.	131,935	100,518	10,505	9,725
Wheat, grain (60 lb.)	Bu.	35,482	22,305	74,340	47,726
Flour, wholly of U.S. wheat (100 lb.)	Bag	1,827	1,519	8,528	6,913
Flour, not wholly of U.S. wheat (100 lb.)	Bag	43	374	220	1,823
Hops	Lb.	233	32	159	14
Peanuts, shelled	Lb.	159	64	48	33
Soybeans, except canned (60 lb.) ...	Bu.	86	301	257	944
Soybean oil, crude, refined, etc. ..	Lb.	48,277	11,288	9,947	1,505
Soybean flour, edible	Lb.	206	306	14	28
Seeds, field and garden	Lb.	639	1,084	241	379
Tobacco, bright flue-cured	Lb.	66,779	42,373	41,878	26,510
Tobacco, leaf, other	Lb.	7,705	7,826	3,883	4,521
Beans, dried	Lb.	15,367	17,129	1,128	1,212
Peas, dried	Lb.	7,584	4,586	442	358
Potatoes, white	Lb.	42,493	31,428	890	1,226
Vegetables, canned	Lb.	11,235	8,596	1,527	1,228
Total above				278,295	195,727
Food exported for relief, etc.				803	583
Other agricultural products				28,687	23,626
Total agricultural				307,785	219,936
Total all commodities				1,221,660	1,207,078

1/ Product weight.

Compiled from official records, Bureau of the Census.

UNITED STATES: Summary of imports for consumption
of selected agricultural products during September 1951 and 1952

Commodity imported SUPPLEMENTARY	Unit:	September			
		Quantity		Value	
		1951	1952	1951	1952
				1,000	1,000
ANIMALS AND ANIMAL PRODUCTS:		Thousands:	Thousands:	dollars:	dollars:
Cattle, dutiable	No.:	19	1/	4,755	4
Cattle, free (for breeding)	No.:	2	1/	741	139
Casein and lactarene	Lb.:	2,350	5,964	643	674
Cheese	Lb.:	3,588	6,486	1,655	2,877
Hides and skins	Lb.:	25,290	11,347	13,801	3,638
Beef canned, incl. corned	Lb.:	13,576	13,310	4,373	4,813
Wool, unmfed, excl. free, etc.	Lb.:	20,457	26,458	31,635	18,564
VEGETABLE PRODUCTS:					
Cotton, unmfed., excl. lint (480 lb.)	Bale:	2	11	513	1,609
Jute and jute butts, unmfed. (2,240 lb.)	Ton :	2	1	405	169
Apples, green or ripe (50 lb.)	Bu.:	14	46	40	123
Olives in brine	Gal.:	421	1,512	867	2,289
Pineapples, prep. or preserved	Lb.:	10,572	14,815	1,205	1,833
Barley malt	Lb.:	4,209	5,223	255	319
Hops	Lb.:	0	0	0	0
Almonds, shelled	Lb.:	430	1,125	150	415
Brazil or cream nuts, not shelled ...	Lb.:	8,262	3,398	1,282	688
Cashew nuts	Lb.:	3,810	4,476	1,537	2,098
Coconut meat, shredded, etc.	Lb.:	5,023	8,592	701	882
Castor beans	Lb.:	5,803	5,637	617	461
Copra	Lb.:	63,956	47,015	4,551	2,516
Flaxseed (56 lb.)	Bu.:	0	0	0	0
Coconut oil	Lb.:	3,825	10,137	473	883
Palm oil	Lb.:	7,236	1,984	1,246	189
Tung oil	Lb.:	1,213	1,161	389	417
Sugar, excl. beet (2,000 lb.)	Ton:	281	352	30,063	40,161
Molasses, unfit for human consumption	Gal.:	9,704	17,189	1,945	2,165
Tobacco, cigarette leaf	Lb.:	6,814	6,787	4,583	4,466
Tobacco, other leaf	Lb.:	1,234	1,227	2,266	2,017
Potatoes, white	Lb.:	31	280	1	11
Tomatoes, natural state	Lb.:	8	372	1	20
COMPLEMENTARY					
Wool, unmfed., free in bond	Lb.:	2,885	14,260	2,507	6,522
VEGETABLE PRODUCTS:					
Bananas	Bunch	3,657	4,440	4,008	4,897
Coffee (ex. into Puerto Rico)	Lb.:	160,314	246,849	80,513	126,550
Cocoa or cacao beans	Lb.:	21,219	19,274	6,867	6,342
Tea	Lb.:	5,835	9,506	2,671	3,953
Spices (complementary)	Lb.:	3,579	5,835	2,224	5,381
Sisal and henequen (2,240 lb.)	Ton:	17	9	8,162	2,916
Rubber, crude	Lb.:	137,087	115,382	59,785	30,995
Total above				277,430	281,996
Other agricultural products				56,340	78,529
Total agricultural products				333,770	360,525
Total all commodities				746,036	882,141

1/ Less than 500.

Compiled from official records, Bureau of the Census.

On a quantitative basis the most significant changes percentage-wise occurred in the exports of soybeans which increased by $2\frac{1}{2}$ times and in the animal products nearly all of which showed significant decreases. Exports of cheese in September 1952 were 95 percent below September 1951, dried eggs 90 percent, butter 81 percent, evaporated milk 78 percent and beef and veal 56 percent. Several fresh fruits were down by about 50 percent while canned fruits were up 61 percent. The number and variety of agricultural commodities showing decreases below last year has grown in each of the past 3 months. In July the commodities or categories showing decreased exports numbered 21; August and September they numbered 24 and 30 respectively.

The value of imports of agricultural products in September showed an increase over the previous two months and also over the previous September. The imports in September 1952 were valued at \$361 million compared with \$337 million last month, \$328 million the previous month and \$334 million in September 1951. The value of imports of nonagricultural commodities showed an increase of 27 percent over September a year ago from \$412 million in September 1951 to \$522 million in September 1952. Coffee was the leading agricultural commodity imported on the basis of value showing a 57 percent increase above September a year ago.

Imports of coffee also showed large increases over imports in either July or August of 1952. The value of sugar imports, the commodity in second place, was 34 percent above September a year ago. The value of imports of wool in September this year was not greatly different from July or August but was 27 percent below September a year ago.

(Continued on Pag3 486)

COPRA EXPORTS FROM INDONESIA SHOW OCTOBER INCREASE

Exports of copra from Indonesia in October 1952 amounted to 20,028 long tons, an increase of more than 75 percent from September exports but less than half the 50,277 tons shipped in October 1951. January-October copra exports totaled 254,710 tons, or only about 65 percent of the volume exported during the same months last year. October 1952 copra destinations were: the Netherlands--11,099; Western Germany--3,000; Sweden--2,500; France--1,574; Norway--1,280; and Austria--575 tons.

Purchases of copra during October totaled 34,152 tons, of which 28,542 tons originated in East Indonesia and the balance in West Borneo. Deliveries to oil mills were reported at 10,716 tons, the greater part--8,169 tons--to mills located in Java.

The buying price of copra in East Indonesia was raised on October 26 to 110 rupiahs per 100 kilograms (preceding price--100 rupiahs) and was guaranteed until the end of November. Exports of copra in November and December are forecast at a total of around 25,000 tons.

EGYPT'S OILSEED OUTPUT DOWN SLIGHTLY IN 1952

Preliminary estimates of Egypt's 1952 oilseed crops place total output at about 754,000 short tons, or moderately below the 770,000 tons produced in 1951, reports J.M. Sayer and J.G. Panos, American Consulate General, Alexandria. Production of commercial cottonseed, which makes up about 95 percent of Egypt's domestic oilseeds, is estimated at 714,000 tons, against 735,390 tons in 1951. About 100,000 tons of cottonseed is used each year in Egypt for seeding, the balance being available for crushing. Other oilseeds produced in 1952 were flaxseed--228,330 bushels (1953 forecast--82,400 bushels), sesame--12,250 tons, and peanuts--21,000 tons.

Production of cottonseed oil from domestic seed in 1952 is estimated at 89,300 tons compared with 88,800 tons last year. Egyptian oil mills, the most important of which are concentrated in Kafr El Zayat, Alexandria, and Cairo, absorb practically all of Egypt's cottonseed production.

Current annual consumption of cottonseed oil is placed by the Federation of Egyptian Industries at around 110,000 to 115,000 tons, the approximate breakdown by use being as follows: cooking oil--82,500 tons; for soap manufacture--26,500 tons; and for vegetable shortening--5,500 tons. Because the current yield of oil from domestic seed does not meet local market demands, periodic imports of cottonseed oil are made from the Sudan, Syria, and other countries. Egypt also consumes between 1,500 to 2,000 tons of linseed oil and from 4,500 to 5,500 tons of sesame oil each year. Most of the peanuts produced are consumed locally either fresh or roasted.

To compensate the high prices of foreign oils and fats and to maintain the price of common soap in the country, the Egyptian government allocated throughout the period January-June 1952 one ton of cottonseed oil to local soap industries for every 4 tons of imported oils and fats. Until December 31, 1951, the government's policy was to allocate an annual quota of 20,000 to 25,000 tons of cottonseed oil to local soap industries. As of January 1, 1952, the quota was gradually reduced and was substituted by imported stearin and residues of local cottonseed oil.

Egypt's average annual production of cottonseed cake for the past 5 years is approximately 485,000 tons. Most of this output is consumed locally as cattle feed and fuel and a smaller quantity as fertilizer. The current policy of the local government is to authorize periodic export permits when surplus quantities of cake are available in the Egyptian market. During the first 6 months of the current year, cottonseed cake exports totaled 5,989 tons, or about half the volume exported during the comparable period in 1951. Normally, export preference is given to hard currency countries, such as Belgium, Switzerland and Denmark. According to local merchants, Denmark alone took some 5,500 tons of the oilcake shipped this year.

**PHILIPPINE COPRA EXPORTS
DROP IN OCTOBER**

Philippine copra exports during October 1952 totaled 64,438 long tons, a decrease of about one-fourth from both the 86,804 tons shipped in the preceding month and the 85,072 tons exported during the comparable month of 1951. Exports of coconut oil were up about 1,000 tons from September, totaling 7,295 tons. Accumulative January-October copra and coconut oil exports this year amounted to 545,264 and 70,026 tons, respectively, against corresponding shipments of 650,293 and 64,169 tons in 1951.

October copra exports were destined as follows: United States--26,243 tons (Pacific-18,228, Gulf-5,815, Atlantic-2,200); Canada--3,100; Japan--492; Belgium--4,000; the Netherlands--19,103; Western Germany--4,000; Norway--250; France--3,700; Italy--1,000; and Europe unspecified--2,550 tons. Coconut oil shipments went to the United States--7,041 tons (Atlantic), the Union of South Africa--260, and Colombia--594 tons.

Copra export prices were quoted in mid-November at \$195 per short ton, c.i.f. Pacific. Local buying prices in Manila were quoted at 37 to 41 pesos per 100 kilograms (\$187.97 to \$208.29 per long ton)..

**FRENCH WEST AFRICA'S VEGETABLE OILSEED
SITUATION CONTINUES DISCOURAGING**

French West Africa's vegetable oilseed situation continues to present a discouraging outlook, reports R.M. Sheehan, American Consulate General, Dakar (see Foreign Crops and Markets, July 7, 1952). This is explained by the high production costs and the competition in Metropolitan France and foreign markets from other sources.

The 1952-53 peanut harvest has not yet begun and trade sources are hesitant to make any production forecasts. It is probable, however, that production may be slightly lower than last year, as unfavorable weather has been reported in several areas. Also, prices for the new crop remain in doubt. Native farmers are now hard pressed financially, and may accept lower prices which in turn would place both peanuts and peanut oil in a more competitive position. This is, however, pre-season speculation, and various other factors may change the picture completely.

The 1951-52 oilseed season, which was considered closed as of August 31, was in general not particularly gratifying from a commercial standpoint because of unfavorable marketing conditions in Metropolitan France and elsewhere. Although shipments of vegetable oilseeds and oils from January through June 1952 were in excess of those for the same period of 1951, figures for the year are expected to show that 1952 exports decreased in tonnage and value from 1951, with one or two exceptions.

The 1951-52 peanut harvest is now estimated at approximately 863,900 short tons, of which 565,480 tons were produced in Senegal. Of the total production 643,470 tons were commercialized, some 77,000 tons were reserved for seed, about 100,000 tons were consumed by natives, and an estimated 40,000 to 45,000 tons were believed smuggled into British colonies.

Peanut sales on the French market so far this year have been reported slow. This is attributed to (1) a high level of peanut stocks, (2) a satisfactory rapeseed harvest in France, and (3) the comparatively high price guaranteed for French West African peanuts.

A c.i.f. price of 97 Metropolitan francs per kilogram (U.S. \$251 per short ton) at French ports was guaranteed by the Government for the Federation's 1951-52 crop. For refiners in Metropolitan France, this resulted in an ex-factory oil price of 130-135 francs per kilogram (\$467-\$479). With rapeseed selling at 61 to 62 francs (\$158 to \$161) or 10 francs below its official price, rapeseed oil can be sold ex-factory at between 140-150 francs per kilogram (\$363-\$389). This difference in price is such that the French refiners prefer to manufacture an easier selling product despite its inferior quality. Thus there have been few if any offers recently for shelled peanuts at 97 francs and French West African exporters are holding back their stocks. As of November 1, 1952, there were approximately 30,000 tons of unshelled peanuts on hand in the Federation. As a result of the Government price support program, exporters will obtain bank loans on their stocks, based on prices to be established by a Price Commission, which was to have met in Paris on November 10. The price was expected to be set between 89 and 93 francs (\$230 and \$241). The difference between the set price and the guaranteed price will be paid the exporter by the French Government.

Local peanut oil refiners are experiencing similar difficulties. It is possible that about 12,000 tons of crude oil will remain on hand by December 31, 1952. The average f.o.b. price at Dakar on October 31 was 76.2 CFA francs per kilogram (\$395 per short ton) compared with 93.9 francs (\$487) at the same date last year.

The 1951-52 palm kernel harvest was estimated at approximately 94,000 tons or similar to previous years. Difficulties also have been encountered in harvesting this crop and exports continue to decline. Only 33,009 tons were shipped in the first 6 months of this year against 39,016 in the comparable period of 1951.

Palm oil production in 1952 is estimated at 77,000 tons, a decrease of 11,000 tons from 1951. This is accounted for by the sharp decline in palm oil prices in France. The c.i.f. price at French ports has averaged 87.50 Metropolitan francs per kilogram (\$277 per short ton) this year and has not exceeded 105 francs (\$272) compared with quotations varying from 125 and 140 francs (\$324 and \$363) in 1951. Exports during January-June dropped from 8,453 tons in 1951 to 3,873 tons this year.

Total output of castor beans, sesame seed, soybeans, shea nuts, and copra has been estimated at 110,000 tons. Of these commodities, shea nuts are the most important as far as foreign commerce is concerned. Although prices for shea nuts have averaged 8 percent lower in 1952 than in 1951, this difference has been offset largely by exempting these nuts from certain local taxes. Hence the return to the exporter and the producer has shown only a slight change.

The future for castor beans, which are cultivated almost exclusively in Dahomey, appeared bright at the beginning of 1952, but by mid-May prices had declined from an average of 23-25 CFA francs per kilogram (\$119-\$130 per short ton) to 14-17 francs (\$73-\$88). January-June exports amounted to 1,121 tons compared with 462 tons in the same months of 1951. However, this tonnage moved almost entirely in the January-March period. For June, only 12 tons were exported.

INSECT DAMAGE REDUCES SPAIN'S OLIVE OIL PROSPECTS

The 1952-53 olive crop in Spain is lower than had been anticipated earlier, reports R.E. Wilson, American Consul, Seville. Olive oil production probably will not exceed 300,000 short tons compared with last season's record output of some 700,000 tons. Excessive insect damage coupled with the off-year cycle is given as the principal cause of the sharp decline. However, large carryover stocks assure adequate supplies for consumption and export next year.

Among the pests and blights attacking the olive trees were the following: fungus (*cyclocomium oleaginum*), olive fly, "aranuelo" (spider), "negrilla," "cochinilla," "barrenillo," (a worm) "lioptris," "polilla" (moth), worms, "repilo," "escudete" (a disease), "tramilla," and "oruga." The spring and early summer were damper than usual, a condition favoring many crops but also favoring insects harmful to olives. Efforts were made to bring the pests under control with arsenate of lime and lead, cyanide, ammonium phosphates, and other substances, but they were only partly successful. Likewise there was little impelling motive for pest control because such heavy stocks of oil were on hand from the previous year's crop and Spanish growers normally expect a heavy crop to be followed by a light one.

The normal Spanish olive oil consumption in times of plenty such as the present is about 400,000 tons a year. As exports through September 1952 have been only about 11,000 tons, the stock on hand from the 1951-52 crop is obviously tremendous and quite sufficient to insure that there will be no shortages during 1953, despite the poor crop this fall. Retail sales of olive oil have probably been very high during the early part of 1952 because of the natural tendency of consumers to buy and hoard stocks of oil, when readily available, against possible future shortages or price increases. Rationing was relaxed early in 1952 and abolished completely in June.

There has been no commercial exportation of green sulphur oil. Because of the short oil crop this year, manufacture of green sulphur oil will naturally be lower than the 92,000 tons yielded by the large crop last year. However, should there be any shortage of raw materials for the Spanish soap industry, with its 1,626 factories and annual capacity production of 165,000 tons, a part of the heavy stock of virgin oil can always be utilized in that way.

The Boletín Oficial del Estado of November 2, 1952, published revised regulations for the olive oil trade and industries for the two coming seasons, 1952-53 and 1953-54. The regulations are little changed from those issued October 24, 1951, but contain one significant modification. Previously, fine oil, defined as oil with acidity of one degree or less, was priced at 1,130 pesetas per 100 kilograms plus a premium of 50 pesetas. However, oil of less than one degree acidity was not priced any higher, so that there was no incentive to produce extra fine oils. Conversely, there was every reason not to do so, as it was more profitable to mix extra fine oil with poorer oil and claim the maximum price for oil of just one degree acidity. The new regulations provide a higher price for oil up to 0.5 degree acidity, so that it is to the producer's advantage to keep his highest quality oil undiluted.

The result of this modification will probably be the marketing of higher quality virgin oil for those willing to pay a higher price, without increasing the price or limiting the availability of qualities formerly handled. The existence of heavy stocks of oil from the 1951-52 crop makes it possible to offer this special price inducement to stimulate production of higher quality oils from the new crop.

MEXICAN WINTER VEGETABLE PROSPECTS

The acreage planted to winter tomatoes in all important areas of Mexico is expected to total 78,400 acres this season compared with 80,600 acres in 1951-52 season. The West Coast districts including lower California show a slight increase from 48,400 acres to 50,700 acres while the El Monte and other districts show a decrease, or from 32,100 to 27,700 acres. Weather conditions and water supplies have not been very favorable except in the Culiacan district and the outlook is for only a slight increase in exportable supplies over those in 1951-52.

The volume shipped this season will depend to a large extent on the market situation in the United States and Canada. The earliest district expects to get started about November 20. Moreover some improvement in the transport service is indicated by the cooperative efforts made by producers, shippers and the railroad management in the West Coast areas.

The acreage planted to green peppers, largely in the Vera Cruz district, is expected to total 48,900 acres this season compared with 37,800 acres in 1951-52. The increases in plantings is expected to be quite general throughout the winter vegetable areas. The acreage of green peas, largely in the West Coast districts, is estimated at 3,580 acres this season against 3,460 acres last year.

U.S. FOREIGN TRADE --(Continued from Page 480)

On a quantitative basis the most significant changes this September occurred in the imports of tomatoes, potatoes, wool and cotton. Imports of these commodities during the month under review were many times as large as in September a year ago. The more significant decreases percentage-wise occurred in the imports of cattle, hides and skins, jute and jute butts, sisal and henequen, Brazil nuts and palm oil. In September this year imports of all of these were 40 to 50 percent less than in September 1951.

The dollar gap between the value of United States imports and exports of agricultural products was much larger in September 1952 than in September 1951. Imports exceed exports by 141 million in the month under review compared with only 26 million in September 1951. This was due to the drop of 29 percent in the value of exports. The value of imports this September was 8 percent greater than in September 1951.

----- By Orval E. Goodsell.

CUBAN RICE
POSITION 1/

Cuban rice imports during the first quarter (July-September) of the 1952-53 quota year (July-June) totaled 189 million pounds as compared with 181 million pounds during the corresponding period of 1951. All imports were from the United States. As expected, heavy imports were made during the first quarter of the new quota year; the total exceeded the 5-year average 1947-48/51-52 period by 53 million pounds. Stocks on hand in the Matanzas Free Zone, together with shipments enroute, were cleared for entry following July 1, 1952, so as to be eligible for the low-duty rate of 84 cents per 100 pounds on United States rice under the quota.

The 1952-53 Cuban low-duty import quota for rice is set at 456 million pounds. July arrivals totaled 95 million pounds, and Free Zone stocks came to 14 million pounds. This left a remainder of 347 million pounds as of August 1, 1952, to arrive under the quota in the 1952-53 year. The United States has allocated for export to Cuba a total of 275 million pounds in the August 1-December 31 period, as announced on September 10 and November 5. This leaves a total of 72 million pounds to be exported to Cuba under the low-duty quota in the second semester (January-June) of the 1952-53 year in order to complete the 456 million pounds.

Milled rice supplies of 165 million pounds from Cuban 1952 production are expected to be available on the market for domestic consumption in volume soon. Cuba's rice acreage increased again in 1952, as much as 10 percent, and the yields per acre are estimated at as high a level as in 1951.

1/ A more extensive statement will soon be published as a Foreign Agriculture Circular available from the Office of Foreign Agricultural Relations, U. S. Department of Agriculture, Washington 25, D. C.

THAILAND MAINTAINS RICE EXPORTS

Rice exports from Thailand during the third quarter of 1952 (July-September) of 855 million pounds brought the January-September total to 2,469 million pounds. Exports in 1952 up to the end of September were maintained at about the same level as in the corresponding period of the preceding year. The rice was shipped primarily to Malaya, Japan, Hong Kong, India and Indonesia.

THAILAND: Exports of milled rice, by country of destination, January-September 1952, with comparisons

Country of destination	Average 1936-40		1952 1/				
	1951 1/	1952 1/	First quarter	Second quarter	Third quarter	January-September	
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	
Borneo.....	7:	63:	13:	18:	14:	45	
Ceylon.....	111:	0:	25:	11:	17:	53	
Hong Kong.....	630:	235:	103:	165:	146:	414	
India.....	77:	507:	64:	171:	128:	363	
Indonesia.....	26:	411:	208:	24:	120:	352	
Japan.....	193:	732:	243:	104:	187:	534	
Malaya.....	1,118:	801:	139:	199:	198:	536	
Philippines.....	52:	243:	0:	0:	0:	0	
Belgium.....	64:	38:	0:	0:	0:	0	
Netherlands.....	82:	133:	4:	2/	0:	4	
United Kingdom.....	75:	1:	2/	2/	0:	2/	
Africa.....	86:3/	43:	2/	2/	2/	2/	
Korea.....	0:	80:	33:	30:	34:	97	
Cuba.....	176:	0:	0:	0:	0:	0	
Other countries.....	223:	87:	4:	6:	11:	21	
Total.....	2,920:	3,429:	886:	728:	855:	2,469	

1/ Preliminary. 2/ If any, not separately reported. 3/ Africa and the Near East.

Compiled from official sources and Embassy reports.

U. S. EXPORTS LESS RICE THAN YEAR AGO

Decreased rice stocks at the beginning of the 1952-53 marketing year (August-July) are reflected in reduced exports of United States rice in the first 2 months of the season compared with the corresponding months of a year earlier. September shipments of 1,017,000 bags (100 pounds) brought the August-September total to 1,535,000 bags compared with 2,453,000 bags in the same period of last season. Above-average exports were shipped at the beginning of 1951-52 because of unusually large carry-over stocks of rice from the previous year. Principal countries of destination of September 1952 exports were Cuba and Japan, which were shipped 48 and 44 percent respectively, of the total.

RICE: United States exports to specified countries,
September 1952, with comparisons 1/

Continent and country	August-July		August-September:		September	
	1945-46:	1951-52:	1951	1952 2/	1951	1952 2/
	to	2/				
	1949-50:					
	1,000	1,000	1,000	1,000	1,000	1,000
	bags	bags	bags	bags	bags	bags
Western Hemisphere:						
Canada.....	399:	443:	38:	35:	15:	22
British Honduras.....	13:	22:	7:	3:	7:	0
British West Indies.....	97:	54:	46:	14:	45:	13
Cuba.....	4,923:	5,118:	1,048:	759:	466:	489
Netherlands Antilles.....	9:	25:	3:	6:	2:	4
Venezuela.....	76:	196:	92:	37:	40:	26
Other countries.....	104:	38:	13:	3:	12:	1
Total W. Hemisphere.....	5,621:	5,896:	1,247:	857:	587:	555
Europe:						
Belgium & Luxembourg.....	73:	57:	3/	6:	3/	4
Greece.....	109:	209:	3/	3/	0:	0
Switzerland.....	32:	21:	1:	0:	0:	0
Other countries.....	4/ 124:	4:	3/	3/	3/	3/
Total Europe.....	338:	291:	1:	6:	3/	4
Asia:						
Saudi Arabia.....	80:	91:	12:	23:	3/	10
Ceylon.....	0:	741:	0:	0:	0:	0
Indonesia.....	646:	1,799:	705:	0:	480:	0
Philippines.....	1,136:	71:	0:	0:	0:	0
China.....	796:	0:	0:	0:	0:	0
Korea.....	98:	2,821:	279:	0:	269:	0
Japan.....	279:	5,430:	207:	643:	1:	444
Other countries.....	60:	9:	3/	2:	3/	3/
Total Asia.....	3,095:	10,962:	1,203:	668:	750:	454
Total Oceania.....	5:	13:	1:	0:	3/	0
Liberia.....	36:	73:	1:	4:	1:	4
Other Africa.....	1:	4:	3/	3/	3/	3/
Total World.....	9,096:	17,239:	2,453:	1,535:	1,338:	1,017

1/ Milled rice, including brown, broken, screenings, and brewers' rice, and rough rice converted to terms of milled at 65 percent.

2/ Preliminary. 3/ Less than 500 bags. 4/ Average of 72,000 bags to Austria, 14,000 bags to Germany and 11,000 bags to France.

Source: Bureau of the Census.

UNION OF SOUTH AFRICA'S GRAIN PROSPECTS LESS FAVORABLE

The outlook for the 1952-53 wheat crop in the Union of South Africa is less favorable than the very good outturns of the past 2 seasons. According to the American Embassy, Pretoria, official forecasts are not available for the crop to be harvested mainly in November-December. Unofficial sources, however, predict a maximum wheat crop of 20 million bushels. This compares with harvests of 25-26 million bushels for the past 2 seasons.

Drought in some important wheat-growing areas is the principal factor in the reduced forecast. It is pointed out that in mid-October no relief had been received from drought in the important producing Orange Free State area. At that time it was stated that if rains were not received soon a further reduction in estimates could be expected.

Other winter grains were said to be in good condition, as these grains, oats, barley, and rye, are grown principally in the western Cape Province. In this area rainfall has been bountiful.

The spring drought in this Southern Hemisphere country was delaying the planting of corn, at latest report, since the drought-affected Orange Free State is one of the most important corn producing areas. The delay was not considered serious at that time, since corn planting can normally take place through early December. The outcome of the crop for harvest next April-May takes on added importance since the small crop harvested in 1952 was considerably below consumption requirements. That harvest is now estimated at about 68 million bushels compared with the 1945-49 average of 87 million bushels.

CANADA REVISES GRAIN ESTIMATES

Actual harvesting results in Canada confirm earlier indications of unusually high yields for all grain crops, according to the November report of the Dominion Bureau of Statistics. Record harvests of wheat and barley and near-record outturns of rye and shelled corn are confirmed. Production of most other grains was above average. Harvesting conditions in the Prairie Provinces were almost ideal, in contrast with unfavorable conditions in that area a year ago. The present estimate places wheat even higher than the record figure forecast in the September report.

The present wheat estimate of 688 million bushels exceeds the previous record in 1928 by 121 million bushels. The high level was attained because of record yields, with acreage about 10 percent below the record acreage of 1940. Yields averaging 26.5 bushels per acre exceed the previous record by a half bushel. The high average this year contrasts with the long-time average of 16 bushels per acre.

The wheat crop in the 3 Prairie Provinces is estimated at 664 million bushels. This exceeds the previous record for all Canada by 97 million bushels and contrasts with the previous record production of 545 million bushels for the Prairie Provinces. It is noted that Saskatchewan's record crop of 435 million bushels has been exceeded only 9 times for Canada as a whole. The outturn of 172 million bushels in Alberta is the second largest of record for that Province. Production of 57 million bushels in Manitoba was the eighth largest of record and was 10 percent above the 1951 harvest there. Winter wheat production is placed at 20.8 million bushels, virtually all grown in Ontario.

The outturn of oats is reported at 466 million bushels. This is sharply below the record crop of 652 million in 1942 and is less than the 1951 harvest. Yields were the second largest of record but acreage has been smaller only once since 1920. Production was less than in 1951 in all Provinces except Manitoba, Saskatchewan and British Columbia.

The current estimate of 291 million bushels for barley is 19 percent above the 1951 harvest and 12 percent above the previous record of 259 million in 1942. The increase over the 1951 level was apparent in all western Provinces, in contrast with declines in eastern Provinces. Record or near-record outturns were reported for each of the Prairie Provinces.

The harvest of rye, fall and spring combined, is reported at 24.6 million bushels, the fourth largest on record. This is 40 percent larger than the 1951 harvest. Yields averaged 19.5 bushels per acre compared with 15.7 bushels last year. Acreage was also slightly larger than the 1951 acreage.

Production of mixed grains, grown mainly in eastern Canada is slightly less than the 1951 harvest. The current crop of 62.8 million bushels compares with 68.5 million a year ago. The reduction is the result of smaller yields, 40 bushels per acre compared with 45 bushels a year ago. Corn production of 19.7 million bushels compares with 16 million bushels in 1951. Yields were reported at 58.1 bushels per acre, compared with 50.9 bushels last year.

Acreage seeded to fall grains for harvest in 1953 is somewhat larger than the acreage seeded last fall. Wheat acreage is placed at 715,000 acres, an increase of 10 percent. This is the acreage for Ontario, the only Province reporting winter wheat separately. The area seeded to rye is estimated at 841,000 acres, an 11 percent increase over the seedings last fall. Substantial increases are reported in each of the Prairie Provinces.

COMMERCIAL MEAT PRODUCTION IN FRANCE
UP DURING FIRST HALF OF 1952

Commercial meat production in France during the first half of 1952 amounting to 1,446 million pounds was 6 percent higher than during the corresponding period in 1951. Although fewer cattle, calves and horses were slaughtered, their slaughter weights were enough higher in 1952 to result in an increased output of beef, veal and horsemeat. The number of sheep and hogs slaughtered increased as did the output of mutton and pork.

FRANCE: Commercial livestock slaughter, average carcass weight and meat produced, first half of 1952 1/

	Number slaughtered (head)	Average carcass weight (pounds)	Meat produced (1,000 lbs.)
Cattle	997,012	617	616,203
Calves	1,757,419	119	208,407
Sheep	2,194,233	33	72,049
Hogs	2,687,543	172	461,432
Horses	135,930	644	87,456
Total	--	--	1,445,547

1/ Commercial meat is that recorded by the Veterinary Services of the Ministry of Agriculture as slaughtered under inspection.

The average carcass weight for cattle is at the prewar level for the first time since the end of World War II. It has been reported, however, that carcass weights decreased sharply in June, July and August when the foot-and-mouth disease epidemic was most severe.

It is estimated that during the first 9 months of 1952 France was a net importer of some 28 million pounds of meat (carcass weight equivalent), imports totalling about 92 million pounds and exports 64 million pounds. France was a net exporter of 65 million pounds of meat in 1951 and 132 million pounds in 1950.

Feed resources for the coming winter are expected to be adequate with excellent grain supplies on hand, although there may be some shortage of oilseed cake. Rotation pastures produced a fairly good third cutting but cool, wet weather made haymaking difficult. Permanent meadows provided late but rather poor grazing in September.

BRITAIN HAS NEW CASE OF
FOOT-AND-MOUTH DISEASE

A case of foot-and-mouth disease in Britain was confirmed on November 4, at Langney, Eastbourne, Sussex. Nineteen animals were destroyed and an area extending about 15 miles around the infected premises has been declared an infected area.

This new case has caused great disappointment in the United Kingdom as there had been no outbreaks since October 6, and the whole country had been declared free of internal restrictions relating to foot-and-mouth disease since midnight October 28, a week before this latest outbreak.

INTERNATIONAL WOOL
STUDY GROUP MEETS 1/

From November 3 to 6 representatives from 31 countries including the United States and observers from 5 international organizations took part in the Fifth Meeting of the International Wool Study Group in London.

The Group reviewed the world wool situation over the 2 years which have elapsed since the Fourth Meeting of the Group in 1950. The Group's assessment of the statistical situation is as follows:

World production of virgin wool in 1951-52 (July-June) amounted to approximately 2,290 million pounds clean, but an increase in carry-over stocks in producing countries at the end of the season reduced total disposals to 2,185 million pounds. Stocks in Argentina and Uruguay are estimated to have increased by 175 million pounds clean, while in contrast the New Zealand carry-over of 70 million pounds accumulated during the 1950-51 season was liquidated during 1951-52. World consumption of virgin wool during the first nine months of 1952 has been running at an annual rate of 2,200 million pounds. Stocks in consuming countries as a whole (including stocks afloat and strategic reserves) showed little change, so that the approximate balance between consumption and disposals was the result of the build-up of stocks in South America.

Total world production in 1952-53 is forecast on a greasy basis at 4,000 million pounds, compared with 3,935 million pounds in 1951-52 and with a prewar average of 3,788 million pounds. The Australian clip is expected to show some recovery and is forecast at 1,100 million pounds, greasy, compared with 1,050 million pounds last season. Both the New Zealand and South African clips have continued to show a moderate increase and an increase has been recorded in the United States clip for the first time for over ten years; it rose from 259 million pounds in 1951 to 270 million pounds in 1952, though this revival may not continue. Only small changes are expected in other countries. Practically the whole of the increase in world production indicated in these figures is expected to consist of crossbred wool, merino production remaining unchanged.

World consumption of wool declined almost continuously from the first quarter of 1950, though there was a moderate but temporary recovery in the last quarter of that year. It reached a low point in the third quarter of 1951, and since then consumption has risen steadily, though modestly. This trend has been experienced by most of the major consuming countries. The most important exception is Japan, whose consumption has continued to rise throughout 1950, 1951 and 1952, although in 1951 consumption was still approximately only 60 percent of that in 1937.

1/ A detailed statement concerning the Wool Study Group and the complete statistical report of the Fifth Meeting will be published as a Foreign Agricultural Circular available from the Office of Foreign Agricultural Relations, U. S. Department of Agriculture, Washington 25, D. C.

In the third quarter of this year world consumption had reached an annual rate of 2,260 million pounds, compared with an annual rate of 2,050 million pounds at the low point in the third quarter of 1951. This increase in wool consumption does not, however, indicate any increase in the total amount of materials used in the wool textile industry. It was off-set by an approximately equivalent reduction in the use of materials other than virgin wool.

The world clip for 1952-53 is provisionally estimated at 2,325 million pounds clean, so that only a relatively small further increase in current consumption would lead to a balance between world production and consumption. In addition to the current world clip, however, there is the large carry-over stock in South America, which at the end of last season appeared to be some 200 million pounds clean in excess of normal. This could thus make total available supplies over 2,500 million pounds. On the other hand the British Government has already announced its intention to continue buying for the strategic stockpile during the 1952-53 season at approximately the same average rate as has applied since the stockpiling operation began, (understood to be 50/60 million pounds clean annually). Other countries have not supplied any information of this kind.

Stocks in importing countries, including strategic reserves and stocks afloat, are estimated to have amounted to 840 million pounds clean at the end of 1951, representing $4\frac{1}{2}$ months' supply at the then current rate of consumption. Current stocks are estimated at just over 4 months' supply at the higher rate of consumption now prevailing.

U. K. TO PAY LOWER PRICES FOR DUTCH BACON

A British Ministry of Food announcement that a new agreement has been made with the Dutch Government covering bacon imports in 1953, is reported by William Kling, Assistant Agricultural Attache, American Embassy in London. This replaces the present 4-year contract which expires on December 31, 1952. Under the new contract the United Kingdom will take up to 78.4 million pounds of bacon between now and January 2, 1954. The price will be 31.6 U.S. cents per pound f.o.b.

The new price compares with 34.1 cents per pound f.o.b. paid since September 1951, or a reduction of 7.3 percent. The Dutch price is also the same as the price that has been agreed for Danish bacon. The reduction reflects to some extent the more ample supplies of bacon, especially from home produced pigs. Some domestically produced bacon or ham is now being sold off the ration but at fairly high prices - 84 cents to \$1.40 per pound. These prices compare with the cost of imported ham and the domestic supply serves to offset the reduced imports of cooked ham that have been in effect in the last year. The lower bacon prices increase the number of foods that have passed the peak of their price rise.

MEXICO MODIFIES EXPORT DUTIES ON LIVESTOCK AND MEAT

Decrees published in the Diario Oficial of November 7, 1952 specify changes in the export duties on cattle and meat, reports Paul G. Minneman, Agricultural Counselor, American Embassy in Mexico City.

These changes reduce the ad valorem duty on the two export classifications of steers and bulls, effective November 10, 1952, and the surtax on both classes of steers and bulls and on chilled and frozen meats, effective November 7, 1952.

Duties for these three export classifications are now as follows:

Fraction No.	Description	Official prices	Total duties per head
10.22.1	steers and bulls weighing under 200 kilos (441 lbs.)	2.25 pesos per kilo (11.9 cents per lb.)	1 peso (11.6 cents) plus 6% ad valorem 1/ plus 5.1% surtax 2/
10.22.2	steers and bulls weighing over 200 kilos (441 lbs.)	2.25 pesos per kilo (11.9 cents per lb.)	1 peso (11.6 cents) plus 7% ad valorem 1/ plus 3% surtax 3/
13.00	chilled and frozen meat	4.35 pesos per kilo (22.9 cents per lb.)	3% surtax 4/, no specific or ad valorem duty

1/ Formerly 10 percent. 2/ Formerly 15 percent. 3/ Formerly 5.1 percent.
4/ Formerly 7.5 percent.

These changes in the Mexican export duties approximate a decrease of 0.6 cents per pound for steers and bulls weighing over 441 pounds, a decrease of 1.7 cents per pound for steers and bulls weighing less than 441 pounds and a decrease of 1.0 cent per pound for chilled and frozen meat. These duty reductions will permit an equivalent increase in the return to the producer or an equal decrease in the price that buyers have to pay for the product. Thus, with other controlling factors remaining the same, there may be some increase in the now relatively low rate of movement of Mexican cattle and meat to the United States.

U.K. TO PAY HIGHER PRICES FOR AUSTRALIAN BEEF AND VEAL

Following discussions in London between representatives of the Australian Government, the Australian Meat Board and the British Ministry of Food, it has been agreed that, in accordance with the provisions of the Fifteen Years' Meat Agreement, the prices to be paid by the United Kingdom for beef and veal during the year ending September 30th, 1953 shall be increased by 20 percent. Under the Long Term Agreement with Australia prices for meat are related to variations in the cost of production of meat in Australia.

The higher prices are not expected to have an immediate effect on increasing beef and veal shipments which will continue to depend on pasture and growing conditions in Australia. Australian officials in London indicate there should be an appreciable increase in shipments of lamb and mutton as a result of the lower wool prices and the previously announced price increase for lamb and mutton of about 17 percent.

EXPORTS OF UNMANUFACTURED TOBACCO DURING CROP YEAR 1951-52 LOWER

Exports of unmanufactured tobacco (not including flue-cured) during the crop year October-September 1951-52 totaled 76.6 million pounds as compared with 91.4 million pounds during 1950-51 and the prewar (1935-39) annual average of 110.9 million pounds. This decrease is primarily attributed to decreased takings of dark fire-cured tobacco; however, decreases also occurred for Green River, Black Fat, and Perique. The decrease was partially offset by increased takings of Burley, Maryland, One Sucker, and cigar leaf.

Exports of flue-cured leaf during July-September 1952 totaled 90.6 million pounds as compared with 129.5 million pounds in the same 1951 period. A more comprehensive coverage of unmanufactured tobacco exports for all types of tobacco in the crop year ending September 30 will be presented in a Foreign Agriculture Circular to be published soon by the Office of Foreign Agricultural Relations, U.S. Department of Agriculture.

Exports of unmanufactured tobacco, by types for 1951-52 crop year with comparisons ^{1/} (export weight)

Type	: Average : 1934-35 : 1938-39	: : 1950-51 :	: : 1951-52 :
	: 1,000	: 1,000	: 1,000
	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>
Burley	: 10,900	: 26,165	: 27,465
Dark-fired Kentucky- Tennessee	: 51,389	: 30,119	: 20,163
Virginia fire-cured	: 9,503	: 4,836	: 4,209
Virginia sun-cured	: ^{2/}	: ^{2/}	: 214
Maryland	: 5,189	: 8,092	: 6,311
Green River	: 3,030	: 2,324	: 2,190
One Sucker	: 886	: 3,599	: 1,740
Black Fat	: 8,974	: 4,355	: 4,216
Cigar leaf	: 1,380	: 6,213	: 6,355
Perique	: 129	: 38	: 51
Trimnings, scrap, stems	: 19,497	: 5,676	: 3,680

^{1/} Flue-cured type crop year July-June, all other types October-September.

^{2/} Not separately shown prior to January 1, 1952.

Exports of flue-cured tobacco July-September 1952
with comparisons

Type	: July-Sept. :	:	:
	: Average :	: July-Sept. :	: July-Sept. :
	: 1934-35 :	: 1951 :	: 1952 :
	: 1938-39 :	:	:
	: 1,000 :	: 1,000 :	: 1,000 :
	: <u>pounds</u> :	: <u>pounds</u> :	: <u>pounds</u> :
Flue-cured	: 77,824 :	: 129,474 :	: 90,641 :
	: :	: :	: :

Compiled in the Office of Foreign Agricultural Relations from records of the Bureau of the Census.

U. S. TOBACCO EXPORTS
IN SEPTEMBER 1952

United States unmanufactured tobacco exports during September 1952 totaled 50,452,000 pounds as compared with 74,746,000 pounds during September 1951. Exports to the United Kingdom, Sweden, and Thailand showed a sizeable decrease as compared with September 1951. However, increases occurred in Western Germany, Denmark, Australia, the Philippine Republic, the Netherlands, Switzerland, and Indonesia.

Exports of unmanufactured tobacco, September 1952, with comparisons
(export weight)

Type	: Sept. :	:	: Sept. :
	: 1952 :	:	: 1952 :
	: 1,000 :	:	: 1,000 :
	: <u>pounds</u> :	:	: <u>pounds</u> :
Flue-cured	: 66,779 :	:	: 42,373 :
Burley	: 1,864 :	:	: 3,720 :
Dark-fired Virginia	: 749 :	:	: 459 :
Dark-fired Kentucky-Tennessee	: 1,642 :	:	: 1,491 :
Maryland	: 706 :	:	: 1,008 :
Green River	: 102 :	:	: 17 :
One Sucker	: 1,403 :	:	: 112 :
Black Fat	: 405 :	:	: 222 :
Cigar Wrapper	: 534 :	:	: 252 :
Cigar Binder	: 300 :	:	: 340 :
Cigar Filler	: 0 :	:	: 206 :
Other	: 263 :	:	: 252 :
Total	: 74,746 :	:	: 50,452 :

Compiled in the Office of Foreign Agricultural Relations from records of the Bureau of the Census.

Exports of tobacco products in the month of September 1952 decreased in practically all classes as compared with September 1951.

Tobacco Products

Class of products	Sept. 1951	Sept. 1951
Cigars & Cheroots, (1,000 pieces)	208	201
Cigarettes, (1,000 pieces)	1,443,133	1,265,701
Chewing tobacco & snuff (pounds)	77,548	97,199
Smoking tobacco in pkgs. (pounds)	46,538	39,682
Smoking tobacco in bulk (pounds)		

Compiled in the Office of Foreign Agricultural Relations from records of the Bureau of the Census.

N O T E

THE TABLE OF WORLD COTTON PRICES IS NO LONGER BEING PUBLISHED WEEKLY IN FOREIGN CROPS AND MARKETS, BEGINNING AS OF THIS ISSUE OF NOVEMBER 24. INSTEAD, STARTING WITH THE NOVEMBER 24 TABLE, IT IS BEING DISTRIBUTED ONLY TO PERSONS ON THE FOREIGN AGRICULTURE COTTON CIRCULAR MAILING LIST. THIS CHANGE IS DESIGNED TO SERVE MORE PROMPTLY THE NEEDS OF THE INTERESTED PUBLIC FOR COTTON PRICE INFORMATION. PERSONS IN THE U. S. NOW ON THE COTTON CIRCULAR MAILING LIST MAY IN FUTURE RECEIVE THE WEEKLY WORLD COTTON PRICE TABLE, FREE, UPON REQUEST ADDRESSED TO THE OFFICE OF FOREIGN AGRICULTURAL RELATIONS, U.S. DEPARTMENT OF AGRICULTURE, WASHINGTON, 25, D.C.

CONSUMPTION OF COTTON IN ITALY INCREASING

The consumption of raw cotton in Italian spinning mills increased near the end of the 1951-52 season after declining from January 1952 (when the effects of the world-wide recession in textile demand began to make itself felt in Italy). Official consumption statistics for the early months of the current season are not yet available but trade sources indicate a consumption of about 79,000 bales (500 pounds gross) during September--considerably above the level during the last half of 1951-52. It appears that only about 41,000 bales were consumed in August; however, this may be largely attributed to the closing of mills for the annual 2-weeks' vacation period. Consumption during 1951-52 totaled 890,000 bales compared with 985,000 bales in 1950-51.

The domestic demand for textile products has increased during the past several months. Domestic sales of yarn during July, August, and September amounted to 14 million, 9 million, and 13 million pounds, respectively. The average monthly sales during this period was about 16 percent above the monthly average during 1951-52. The exports of textile goods, upon which the Italian textile industry depends to a considerable extent, have increased somewhat during recent months over those of early 1952. However, textile exports are still on a relatively low level even though exports of yarn during July-September 1952 amounted to 23 million pounds, a substantial increase over the 1951-52 level. Textile stocks are being slowly reduced but large quantities are still on hand. During the past season only 16 percent of the cotton textile production was exported in contrast to the usual exports of 30 to 40 percent. The 1951-52 exports of textiles declined sharply after January and February 1952 when the United Kingdom and France limited imports of Italian textiles because of the unfavorable balance of trade and foreign exchange positions of these countries.

Imports of raw cotton during the latter part of 1951-52 were considerably larger than the amounts consumed. This resulted in the building up of stocks from a 1951-52 seasonal low of 208,000 bales on December 31, 1951, to 395,000 bales at the beginning of the current season (August 1, 1952). Trade sources indicate that about 66,000 bales were imported during August 1952. Although official import and consumption data are not available for any part of 1952-53 it appears that present supplies are equivalent to about 5-months' working stock at present rates of mill operation. Import requirements for the current season (1952-53) may about equal last season's imports of 843,000 bales, which were 175,000 bales below 1950-51. Of the 1951-52 imports, about 594,000 bales were received from the United States.

CONSUMPTION OF COTTON IN WESTERN GERMANY GRADUALLY RISING

Consumption of raw cotton in West Germany which declined to a 1951-52 seasonal low of 63,000 bales (500 pounds gross) in June 1952 has increased since that month, according to Philip F. Dur, American Consul, Bremen. Consumption during July 1952, the last month for which official statistics are

available, amounted to 74,000 bales. Trade sources indicate an increase in consumption to about 85,000 bales in September. Consumption in West Germany during 1951-52 totaled 910,000 bales (subject to revision) a decline of 135,000 bales from 1950-51.

Imports of raw cotton during August 1952 totaled 62,000 bales (500 pounds gross), about half of which originated in Egypt and the United States. According to trade sources imports during September were slightly higher, probably amounting to about 66,000 bales. Stocks of raw cotton held at the beginning of the current season (August 1, 1952), amounted to 141,000 bales (subject to revision), a decline of 26,000 bales from a year earlier. Inventories probably have been further reduced this season as it appears that the amounts of cotton consumed during August and September may have slightly exceeded the quantities imported. Negotiations have been under way with Brazil for some time, under the German-Brazilian Trade Agreement, for securing substantial quantities of Brazilian cotton. However, the actual amounts that may be imported from Brazil, if they have in fact been determined, have not yet been announced.

Retail sales of textiles have increased gradually since April 1952 and cotton mills have recently reported some additional increase in textile orders. Even though textile inventories are being reduced, substantial quantities are still in stock. Consumption of raw cotton is not expected to substantially increase above present levels until these inventories are further reduced.

In general, the policy of most German spinners seems to be one of limiting purchases of raw cotton not only until textile stocks are lower but also until the future demand for yarn is better known. It has been reported that the yarn orders already placed are adequate to permit the operation of spinning mills at the present, or slightly higher, rate for several months. However, the uncertainty about future demands for yarn has resulted in a somewhat cautious attitude regarding further increases in yarn inventories at this time.

L A T E N E W S--(Continued from Page 465)

The Government of India, on November 19, abolished the export tax on Assam Gomillas cotton, reduced the tax on Bengals to 125 rupees per bale of 392 pounds net (6.69 cents a pound), but retained the export tax of 200 rupees (10.70 cents) on all other varieties. A tax of 200 rupees on all cotton exported has been in effect since March 17, 1952 (400 rupees prior to that date).

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Malaya has recently announced import quotas amounting to \$80,000,000 for Japanese textiles during 1953. Half of this quota has been allocated for the first 6 months of 1953. This quota is substantially below the value of Japanese textiles imported during the past 2 years (\$57,000,000 in 1950, \$147,000,000 in 1951, and over \$97,000,000 during the first half of 1952).